

AFP Rhode Island

Strategic Plan, 2013 – 2015

Fiscal years January 1, 2013 – December 31, 2015

Table of contents

- Overview of the chapter's planning process, *Page 2*
- Setting the context for AFP RI, *Pages 3 – 4*
- What's happening in the external environment, *Page 5*
- Why AFI RI matters, its impact, *Pages 6 – 7*
- Values, mission, and vision, *Page 8*
- Priorities goals and strategies for 2013, *Page 9*
 - Summary of priorities for 2013, *Page 9*
 - Focus: Infrastructure, *Pages 10 – 11*
 - Focus: Innovative organization, *Page 12*
 - Focus: Programs and services, *Pages 13 - 14*
- Making the plan work, *Pages 15 – 16*
- Calendar, *Page 17*

Overview of the chapter's planning process

In spring 2012, the AFP RI Chapter began its strategic planning process, the first in a number of years. Core elements of the planning process included: Background papers describing activities of the chapter; information about the external environment; survey of individuals working in fundraising; focus groups; and so forth.

Members of the strategic planning taskforce were: Cheryl DeIPico, president of the chapter; Lisa Lydon, immediate past president; and Michele Berard, president elect. Simone Joyaux served as the planning consultant.

The gathered information served as the basis for the planning retreat, held on December 1, 2012. Board and committee members participated in the retreat.

The planning process documents – including the Advance Information Packet, Retreat Summary, Mission Proposal, and so forth – serve as resource documents to implement the plan. The board, its committees, officers, and working groups, will use these materials to help move the chapter forward.

Setting the context for AFP RI

The need is great

The nonprofit sector is “the keystone of a caring society.”¹ A strong nonprofit sector depends upon strong nonprofit organizations. Ensuring strong nonprofit organizations includes capacity building (for the organization) and professional development (for the individual). Ensuring a strong nonprofit sector also requires appropriate public policy.

Research and experience show that nonprofits often lack the capability (knowledge and skills) and capacity (human and financial resources) to carry out their missions. Nonprofits need education and training – at the entry and mid-levels of expertise – in key areas of knowledge required to effectively operate. Typically, the biggest areas of need include fundraising, governance, and planning.

The AFP network

Through its network of local chapters, AFP (Association of Fundraising Professionals) has long been a provider of education and training throughout North America. With monthly programs and annual conferences, AFP chapters (www.afpnet.org) can provide professional development for those working in nonprofit organizations.

AFP is the largest association of professional fundraisers in the world. AFP operates, primarily, in North America, and partners with national fundraising associations around the world.

The AFP network of chapters depends on local professionals who volunteer their time to serve on chapter boards, plan and deliver programs, serve as mentors, and advocate for strong public policy to support the nonprofit sector.

AFP chapters welcome individuals from all types and sizes of organizations. From grassroots groups to sophisticated institutions, individuals develop their knowledge and skills, network with colleagues to gain insights, and build a strong nonprofit sector.

Participants in chapter activities include members and non-members. Members belong at the international level and affiliate at the local level, with a particular chapter.

AFP RI

Founded in the early 1980s, AFP RI has long offered some of the best and most reasonably-priced education and training activities in the state. The chapter also celebrates philanthropy with one of the largest National Philanthropy Day celebrations in North America.

In the late 1980s, AFP RI made two key operating decisions. And during this strategic planning process – launched in spring 2012 – chapter leadership upheld these decisions:

- First, the chapter recognized that many nonprofit workers (and their organizations) could not afford membership in AFP. The chapter committed to welcoming all.
- Second, the chapter recognized that the model of monthly breakfast or lunch – with 45 – 60 minutes of training – was problematic. Adding a meal made the meetings too expensive for the majority of the Rhode Island marketplace. Also, 45 – 60 minutes of training was inadequate. So the chapter committed to 2-hour workshops with no meal cost.

¹ Waldemar A. Nielsen, “The Third Sector: Keystone of a Caring Society,” an Occasional Paper published by the Independent Sector, Washington D.C. Nielsen presented this paper at the 25th anniversary conference of the National Council on Philanthropy, Denver, Colorado, November 1979.

Operating in a small and congested marketplace

Geographically, AFP RI draws participation from the state of Rhode Island and nearby shoulder communities in Massachusetts and, sometimes, Connecticut. The chapter's reach does not, usually, extend beyond this.

The New England area hosts many active professional organizations including AFP chapters, chapters of Women In Development, NEAHP, CASE regions, chapters of Partnership for Philanthropic Planning, unaffiliated fundraising associations like CONFR, and statewide nonprofit associations. In Rhode Island, New Roots also provides training. However, the organization's future funding is uncertain.

In addition to professional organizations, the area includes several community foundations that offer education and training – specifically, the Initiative for Nonprofit Excellence at the Rhode Island Foundation, the Hartford Foundation for Public Giving, and the Greater Worcester Community Foundation.

What distinguishes this chapter

As noted previously, AFP chapters are not known for depth of education and training offered regularly in RI – a 2-hour workshop several months each year. Instead, most AFP chapters offer a monthly breakfast or lunch networking meeting with 45 – 60 minutes of training.

Also, AFP RI has several local speakers of national and international repute.

All this said, it is likely that AFP RI will remain – primarily – a local offering. However, there might be opportunities to market some monthly programs or special training opportunities with highly-recognized speakers.

What's happening in the external environment

Like any organization, AFP RI operates within an ever-changing environment. Through the strategic planning process, chapter leadership examined the environment, and identified areas of both concern and alarm.

The environment affects the chapter's capacity and operations – from finances to volunteer time and everything in between. Chapter leadership – from the board to its committees, officers, and working groups – will pay attention to these issues. The chapter will monitor trends and their implications.

Issues of greatest concern – currently – are presented here².

1. Resources
 - a. Economy (Shrinkage of federal and state funding): *Concern=10/Alarm=5*
 - b. Economy (Implications of people's access to funds and the education they need. Available resources, e.g., time to attend; \$ to do professional development.)
Concern=2/Alarm=14
 - c. Time constraints *Concern=8/Alarm=7*
 - d. Time (Limited resources and too much responsibility) *Concern=7/Alarm=9*
2. Demographics (outreach and communications)
 - a. Generational discrepancies and distinctions are more profound *Concern=9/Alarm=5*
 - b. How people get involved. Commitment, different length and types of engagement, engagement in social sector *Concern=5/Alarm=9*
3. Nonprofit sector
 - a. Blurring of boundaries between for-profit and nonprofit sector *Concern=13/Alarm=2*
 - b. Lack of value for fundraising as a profession *Concern=3/Alarm=10*
 - c. Lack of understanding of value and operations of the nonprofit sector
Concern=3/Alarm=10
4. Societal issues
 - a. Technology (varying usage and keeping up with innovation) *Concern=1/Alarm=15*
 - b. Increased competition *Concern=6/Alarm=9*
 - c. Congestion (over saturation of nonprofits and other organizations in the marketplace; apathy; lack of collaboration; trust of donors) *Concern=6/Alarm=9*
 - d. Ignorance, science of why we don't believe science (fact-deniers) *Concern=11/Alarm=3*
 - e. Ethics *Concern=4/Alarm=10*
 - f. Perception of nonprofits (mismanagement, scandals, misappropriation of funds all are highly newsworthy) *Concern=12/Alarm=4*
5. Government
 - a. Public policy (impact of government regulations, laws, and cuts) *Concern=8/Alarm=8*
 - b. Loud lobbying forces *Concern=13/Alarm=3*

² The full list of concern/alarm is included in the Summary of the December 1, 2012 planning retreat. That document serves as an essential resource for plan implementation, committee guidance, etc.

Why AFP RI matters, its impact

Chapter focus

AFP RI Chapter exists to help build a strong nonprofit sector and strong organizations by promoting ethical fundraising. As a professional development service organization, AFP RI benefits diverse constituents in our community. Services include training and education, advocacy, and the celebration of philanthropy.

Chapter operations

AFP RI is a chapter of the Association of Fundraising Professionals (AFP), the largest association of fundraisers in the world.

The RI chapter is comprised of volunteers who plan, manage, and carry out all activities, supported by part-time paid administrative support. Like any nonprofit, an all-volunteer board serves as the governing authority.

Target audiences

The audience for AFP RI is individuals working and volunteering in nonprofits. Services focus on entry, mid-level, and advanced practitioners.

Our primary audience is the fundraiser, including development officers, development support staff, and executive directors without development staff. The secondary audience includes bosses of fundraisers, fundraising volunteers, and other nonprofit professionals that think they might benefit from explore to fundraising principles and practice.

Chapter services

Education and training:

The AFP RI Chapter focuses on developing the knowledge and skills (capabilities) of fundraisers, those individuals with primary responsibility for securing charitable gifts. AFP RI also makes its programs available for fundraising support staff, volunteers, and other interested individuals.

AFP RI provides professional development to diverse individuals operating at diverse levels of expertise and experience from the newest practitioner to the most advanced. The chapter recognizes that needs are different at different levels, with the greatest need at the entry and mid-levels.

AFP RI recognizes that “asking for the gift” is only one part of philanthropy and fund development. The Chapter designs its programs/activities based on the documented body of knowledge, research, and codification work from educational leaders³.

³ The body of knowledge, research and codification work includes such things as:

- CFRE International job analysis – which is regularly updated based on research with fundraisers around the world. See the Test Content Outline posted at www.cfre.org for details. Key knowledge areas include: Current and prospective donor research. Securing the gift. Relationship building. Volunteer involvement. Leadership and management. Ethics and accountability.
- AFP International work that produces such guidelines and resources as *Knowledge Areas and Curriculum Framework*.
- Books developed by leaders in the field including *Fundraising Principles and Practice* (Adrian Sargeant, Jen Shang, and associates) the first-ever book written as a text for university courses. See the booklist at CFRE International, which is used to support the Test Content Outline. See, also, booklists at AFP International.

Delivery of education and training includes various methods, e.g., face-to-face workshops, annual conference, group participation in audio/web conferences, etc.

Networking

The chapter provides regular opportunities for fundraising professionals to network with each other, with vendors who support our work, and with funders. These events and activities assist in building a professional culture, exchanging and sharing ideas, deepening relationships, fostering collaborations, and supporting fundraisers who practice in Rhode Island and the surrounding communities.

Celebrating philanthropy

The chapter brings organizations, donors and volunteers together to celebrate National Philanthropy Day. The event highlights the importance of philanthropy and the nonprofit sector in Rhode Island. The AFP RI NPD Celebration is one of the largest in North America.

Advocacy for appropriate public policy

The chapter recognizes that bad public policy harms nonprofits. The chapter partners with other advocates in RI to support good public policy and fight against bad policy.

Other services

The chapter develops other programs and activities based on needs and the chapter's own capacity, as an all-volunteer organization, to do the work. Other services might include a mentoring program, community-wide fundraising training calendar, website that links people to resources, etc.

Way of working

Communication, coordination, collaboration, partnerships

AFP RI Chapter embraces a continuum of relationships with other organizations, from communication to partnerships.

AFP communicates and coordinates with other organizations to enhance services, eliminate duplication, and meet community needs. The Chapter collaborates and partners with other organizations to increase reach, leverage and impact.

We reach out to media to position the chapter as a “go to” resource for fundraising and public policy issues.

Affiliation with AFP International

Affiliation with AFP International provides the RI chapter with multiple resources, e.g., training to manage and govern an all-volunteer organization; resource materials for developing education and training programs and other activities; resources for advocacy and public policy work; and, a support network of other chapters and colleagues.

Affiliation with AFP International positions this local fundraising group within a larger and more powerful voice for philanthropy.

Participation

AFP RI Chapter encourages and welcomes individuals to participate in professional development in different ways. For example, staff and volunteers attend our workshops and conference; organizations participate in our National Philanthropy Day Celebration.

Membership is also available, a national membership with a local chapter affiliation. AFP International and the AFPRI Chapter offer specific benefits described in various publications.

But AFP RI does not require nor expect membership. AFP RI recognizes that the small marketplace in this state (number of organizations and professionals) and the

marketplace capacity (primarily smaller organizations with financial limitations) will not produce a significant number of members.

We welcome everyone – through attendance, subscription, contribution, or membership.

Transparency, competency, and top-notch communications

AFP RI believes in transparency

Values, mission, and vision

Values describe our unwavering beliefs. These values provide the foundation and framework for doing AFP RI's work. For example, we use these values to screen candidates for board membership, design programs and activities, and inform decision-making.

- **Collaboration:** We know that the greatest results come from the combined efforts of diverse individuals and organizations. We reach out to communicate, coordinate, and collaborate with other service providers and those who share our vision of competent and ethical fundraising staff and volunteers building strong organizations, a vibrant nonprofit sector, and better world.
- **Excellence:** We pursue excellence in all areas of endeavor, e.g., customer service, quality programs and services, and in our own governance and operations. We maintain the highest standards of integrity and ethics, transparency and professionalism.
We recognize that sustainability depends upon making change, building our own adaptive capacity. We do this by: paying attention to what's happening in the external environment; being inquisitive and innovative; using conversation as a core business practice; learning together; and, monitoring our own performance and impact.
- **Inclusion:** We embrace diversity and work diligently to create an inclusive organization. Others perceive AFP RI as accessible and welcoming.
We recognize that differences in life experience – e.g., race/ethnicity, gender, generation, sexual orientation, socioeconomic status, etc. – influence one's perspective and insights. We know that differences in professional and volunteer experience – e.g., size and type of organization – are important.
- **Leadership:** We're proactive, not just reactive. We're bold and courageous. Individuals and organizations, government and media recognize us as operating at the forefront of professional development, promoting ethical fundraising. We're seen as a reliable go-to resource.

Mission: AFP RI Chapter

AFP RI helps build strong nonprofit organizations through training staff and volunteers, advocating for good public policy, and celebrating philanthropy.

As a chapter of the Association of Fundraising Professionals, AFP RI supports the international mission: AFP, an association of professionals through the world, advances philanthropy by enabling people and organizations to practice ethical and effective fundraising. The core activities through which AFP fulfills this mission include education, training, mentoring, research, credentialing, and advocacy.

Vision: AFP RI Chapter

AFP RI envisions a community where staff and volunteers practice ethical fundraising in order to build a vibrant nonprofit sector that builds a better world.

AFP RI endorses the vision of its parent body, AFP: Fundraising is viewed as a credible and respected profession for civic betterment throughout the world.

Goals and strategies, timeframes and accountability

Introduction

During the first year of this multi-year strategic plan, the chapter will focus on strengthening operations and governance. As part of this priority, the chapter will also begin a cultural change to operate according to its values, with a particular emphasis on excellence and collaboration.

In addition to the focus on infrastructure, AFP RI will put in place critical guidelines to refresh its current programs. To create the guidelines, the chapter will launch a series of conversations with potential collaborators and partners, establish a set of deep-focus taskforces to explore opportunities and document best practice.

See further detail in the retreat summary and background information provided prior to the retreat. These materials serve as important components for future work by chapter committees, taskforces, and the board.

Summary of priorities for 2013

AFP RI's board of directors feels a sense of urgency in some components of the plan – specifically, the focus on infrastructure. Subsequent areas of focus depend, first, on the timely development of a stronger infrastructure. In addition, the chapter needs to lay the groundwork for refreshing program.

- Focus: Infrastructure
 - Goal #1, Strengthen chapter operations. Strategies A, B, C, D, E, F, G
 - Goal #2, Strengthen governance. Strategies A and B
 - Goal #3, Strengthen financial operations and promote fiscal sustainability. Strategies A and B

- Focus: Programs and services
 - This is the heart of the chapter – and beginning with Goal #2 page 13, represents a significant cultural and practical change for the future.
 - The intent is to coordinate and collaborate with other service providers and community networks to ensure comprehensive professional development for individuals and volunteers in the nonprofit sector. See our “way of working” on page 7.
 - Imagine the possibilities... Coordinated calendar for professional development. Periodic integration/coordination of program content. Avoidance of duplication. Joint planning for some activities. And more.
 - This approach is obvious for such a small state – but also challenging; exciting – but also scary. We may not succeed – but we intend to try.

- Focus: An innovative organization
 - We know that innovative organizations are more sustainable and enduring. We've articulated particular goals and strategies to build our capacity for innovation.
 - Our biggest innovation is the attempt at coordination and collaboration for service. Only time will tell if we succeed – and how well.

FOCUS: Infrastructure

Infrastructure refers to the systems and processes, policies and procedures put in place to support mission and program. Effective and efficient infrastructure is essential for sustainability.

Goal #1: Strengthen chapter operations

Strategies:

- A. Secure adequate and appropriate administrative support.
 - Analyze the chapter's administrative needs. Identify skills and experience required. Define system for administrative supervision and work assignments.
 - *Status: 6-month trial with association management firm, February 1 – July 31. Future system to be determined.*
- B. Put in place the optimum management information systems, e.g., technology (software and hardware), list development, etc.
 - Analyze the chapter's MIS needs. Investigate opportunities and costs.
 - *Status: Initiate in 1st quarter 2013 with taskforce appointed by chapter president.*
- C. Improve chapter communications.
 - Improve sales copy to promote chapter programs and activities. (*Immediately*)
 - Analyze distribution mechanisms and outline optimum process, e.g., the audience list (Strategy B above), social media, website, e-mail, print, media contact, etc.
 - *Status: Establish ad hoc taskforce of experts to figure this out. 1st or 2nd quarter 2013.*
- D. Develop standard operating procedures for key portions of the chapter's work.
 - *Status: Initiated at the end of 2012. Target completion date, end of 1st quarter 2013.*
- E. Develop operating structure to do the chapter's work.
 - Outline the scope of work required to manage the chapter, its operations, governance, programs and services, e.g., board, committees, individual tasks, etc.
 - Develop volunteer recruitment, training, support, retention, and recognition systems.
 - *Status: Assign to Governance Committee to incorporate operations, management, and governance. Complete no later than the end of the 1st quarter 2013.*
- F. Maintain an annual chapter calendar to coordinate activities and manage workload.
 - Include programs and services for delivery to the community.
 - Incorporate key points for chapter workflow.
 - *Status: See preliminary mock-up at the end of this plan. Complete in January.*
- G. Create a professional website for the chapter⁴.
 - Include the following: Search engine optimization; professional design; usability for the chapter's diverse constituents; etc.
 - *Status: Explore feasibility later in 2013.*
- H. Review and formalize the chapter accords process.
 - *Status: Launch this process towards the end of 2013, after the work on operations and governance has codified the chapter's direction.*

⁴ There is no need to create an extensive website. The Internet already has many good fundraising websites and libraries. Instead, AFP RI needs a website that helps visitors access chapter services and perform functions related to the chapter.

As AFP RI explores its expanded thinking for programs and services (see pages 13 and 14), the website might take on new aspects.

Goal #2: Strengthen chapter governance.

Strategies:

- A. Develop governance systems and processes, policies and procedures.
 - Outline standard operating procedures, e.g., board job description, board member performance expectations, committee roles, candidate screening and recruitment, orientation and training, succession planning, volunteer recognition, etc.
 - *Status: Governance Committee. Target completion date 2nd quarter 2013. Launch for the next board election. (Joyaux volunteered to conduct a work session and provide sample materials for chapter use.)*
- B. Review and, as necessary, revise chapter bylaws.
 - *Status: Do this later in 2013 after completing the preliminary work in governance.*

Goal #3: Strengthen financial operations and promote financial sustainability.

Strategies:

- A. Outline financial operating systems, procedures and policies.
 - Include such items as: annual budgeting process to support strategy, priorities, and the annual plan of work; regular financial reporting, actual compared to budget, for board analysis; etc.
 - *Status: Establish a Board of Directors Finance Committee, chaired by the Treasurer. Complete this work in the first half of 2013.*
- B. Diversify and maximize revenue streams.
 - Make personal follow-up calls for membership retention and recruitment. (*Board members*)
 - Explore subscriptions for educational programs. (*Education and Finance Committees*)
 - Evaluate sponsorship opportunities, e.g., NPD, conference, etc. (*Appropriate committees*)
 - Develop a fundraising plan to coordinate the solicitation of sponsorships, scholarships, and other charitable investments.
 - *Status: Ask the Finance Committee to coordinate with other committees. Do this work in the 2nd or 3rd quarters of 2013, to launch for fiscal year 2014. Test some ideas in FY 2013.*

Goal #4: Take better advantage of the AFP International network.

Strategies:

- A. Send at least one AFP RI board member to AFP's Leadership Academy each year.
- B. Access AFP International's resources.
- C. Connect with other chapters in the AFP network.
 - *Status: Institutionalize this within chapter leadership and committees.*

FOCUS: Innovative organization

Once the fundamental infrastructure is more strongly in place, AFP RI Chapter plans to move to the next level. We need to create an innovative organization that can prepare for any future that might come along. This, too, is a culture change – and particularly hard to do in an all-volunteer organization. But we plan to try!

First, an innovative organization is a mindset, a philosophy, a self-awareness, and an attitude. That’s hard to measure. But we will incorporate conversation about innovation and creativity in our committee work and in our annual board planning retreat. (See more about this retreat in the section called “Making the plan work.”)

Of course, goals and strategies help, too. We’ve articulated some goals and strategies to keep the focus of innovation and creativity alive. We anticipate that this culture change will build as we intentionally practice these strategies, foster these conversations, and – as we accumulate results.

Goal #1: Build the chapter’s adaptive capacity⁵.

Strategies:

- A. Operate with an external focus. Monitor what’s happening in the community/world, identify emerging trends and their implications for the chapter.
 - B. Be inquisitive, curious: Use learning organizations and systems thinking theories to question and explore. Use cage-rattling questions to stimulate conversation, and produce learning and change.
 - C. Innovate. Don’t just react. Be proactive. Generate new ideas. Survey and benchmark other successful professional associations, AFP chapters, and successful for-profit and nonprofit businesses.
 - D. Maintain network connectedness. From communication through coordination to collaboration and partnerships.
- *Status: Ongoing practice and cultural change.*

Goal #2: Balance reactionary with proactive.

Strategies:

- A. Embrace conversation as a core business practice, using cage-rattling questions to generate strategic conversation and produce learning and change.
 - B. Explore issues from various vantage points / through various lens.⁶
 - Distinguishing between concern and alarm
 - Foreseeing the unforeseeable
 - Differentiating between risk and gamble (Military concept: Risk = We can extricate ourselves. Gamble = No way out.)
 - Anticipating unintended consequences
 - Imagining that the inconceivable becomes inevitable
- *Status: Ongoing practice and cultural change.*

⁵ From Carl Sussman, “Making Change: Building Adaptive Capacity,” *Nonprofit Quarterly*, Winter 2003

⁶ Developed as a planning and assessment tool by Simone P. Joyaux, ACFRE, www.simonejoyaux.com.

FOCUS: Programs and services

Of course, a sustainable and innovative organization doesn't matter unless we provide quality services that meet the needs of our targeted constituencies. And, we cannot do this mission work without adequate infrastructure.

Our focus for 2013 is to maintain our current scope of services, e.g., regular workshops, conference, NPD celebration, and networking breakfasts. We will use the strategic planning process and its findings and results to make improvements in these areas. It is doubtful that we will add any new programs and services in 2013. However, we will use 2013 as the planning year to develop and test meaningful change for launch in 2014.

Goal #1: Maintain and strengthen current programs and services.

Strategies:

- A. Improve education and training, workshops and conference
 - Use the body of knowledge and guidelines, noted on page 6 of this plan to select topics for workshops and annual conference.
 - Recruit and support quality presenters.
 - Conduct participant evaluation.
 - Ensure proper sales marketing/communications.
 - *Status: Current work of Education Committee*
- B. Maintain National Philanthropy Day
 - Secure feedback from past sponsors. As appropriate, make improvements.
 - See other comments and notes from planning process.
 - *Status: Current work of NPD Committee*
- C. Host networking breakfasts.
 - *Status: Current work of Membership Committee*
- D. Develop engagement opportunities for advanced executives.
 - Consider volunteer opportunities, e.g., operations and governance positions, speaking, etc.
 - Consider professional development opportunities, e.g., education and training, book clubs, etc.
 - *Status: Establish an ad hoc task force late in 2013 to make recommendations for launch in 2014.*
- E. Move into the next generation of education and training.
 - Develop a list of good speakers (and their topics) within driving distance of RI.
 - Establish an ad hoc task force to examine the AFP RI conference – its history and results – and make recommendations for the future. Consider, for example, the following:
 - Primary purpose, e.g., money-maker or education
 - Collaborative/partnership opportunities, e.g., local, regional
 - Attendance compared to other local conference offerings
 - Speakers, e.g., local, regional, national; fees, travel, no cost
 - Exhibitors
 - *Provide recommendations by the end of 2013 – for launch in 2014 or 2015.*

Goal #2: Develop key relationships to advance professional development for the community.

Strategies:

- A. Embrace the continuum of communications | coordination | collaboration | partnerships.
 - Articulate ideas about how this might work, e.g., coordinated calendar, joint planning for some program content, shared promotion, and so forth.
- B. Identify potential relationships for coordinated calendar⁷, developing education and training programs⁸, and, promoting these programs⁹.
 - Host meetings to introduce the concept, test ideas, secure feedback – and do what can be done.
- C. Promote a statewide calendar for professional development / capacity building for the nonprofit sector. (Maybe the chapter maintains this; maybe the chapter recruits another organization to maintain it.)
 - *Status. Launch planning early in 2013. Finalize for implementation in 2014. Perhaps the president elect takes the lead on this work.*

Goal #3: Support good public policy for the nonprofit sector.

Strategies:

- A. Utilize formal connection to AFP International to monitor legislative and regulatory activity by government related to fundraising and other aspects of the sector for chapter advocacy efforts.
- B. Build and nurture relationships with local agencies such as United Way, ACLU, Rhode Island Foundation, New Roots Providence, Ocean State Action to stay informed and act on any legislation that will affect Rhode Island’s nonprofit sector.
- C. Use these partnerships to monitor what’s happening in our areas of interest, and jointly advocate and lobby.
- D. Establish a chapter mechanism to develop plans and coordinate actions.
 - *Status: Meet with Gayle Gifford, current leader, to secure recommendations and outline systems.*

⁷ For example, calendar coordination with other service providers: INE/RIF, New Roots, PPPRI, NEAHP, etc.

⁸ There are some obvious gaps in participation in AFP RI, e.g., staff and volunteers of arts and cultural organizations. AFP RI can demonstrate its added value to these organizations by partnering with RISCA to develop programs. Then RISCA can promote AFP RI programs to arts and cultural organizations. The same holds true for RICH and any number of other associations and networks.

Ideas for joint planning/program development:

- Other service providers like INE/RIF, New Roots, PPPRI, NEAHP, etc.
- Associations / networks that have staff and volunteers who need services, e.g., RISCA, RICH, Coalition Against Domestic Violence, etc.

⁹ AFP RI Chapter can develop – and institutionalize – promotional relationships with key networks to cross market activities.

Goal #4: Position the chapter as a go-to resource re: professional development for ethical fundraising.

Strategies:

- A. Develop relationships with key media – both online and print.
 - B. Link locals to selected resources. (Google already does this, of course. But, perhaps, the chapter’s website might connect visitors to particular highlights.)
 - C. Develop an e-news, perhaps quarterly, that could include promotion of chapter programs and services, guest bloggers, etc.
- *Status: Begin this work later in 2013, as time permits.*

Making the plan work

Values, mission, and vision

AFP RI uses its values and mission to guide its work. Neither values nor mission change very often. The vision articulated in this plan is aspirational. We expect to develop several multi-year strategic plans rooted in our vision, stated earlier in this document.

Monitoring the external environment

We have to stay on top of what’s happening in the external environment. We talk about what’s happening and the implications for our chapter and those we serve.

Monitoring progress on the plan

AFP RI charges its seated president, president elect, and immediate past president to serve as a taskforce for monitoring implementation of this plan. This triumvirate provides leadership to ensure that all committees, taskforces, and volunteers with the chapter follow the plan.

Quarterly, the taskforce engages the board of directors in a conversation about the progress on the plan, opportunities and threats to implementation, and interventions required.

Measures that we use

There’s that old saying, “what gets measured gets done.” Measures are not merely quantitative. Measures are also evidence based, e.g., word-of-mouth, anecdotes, invitations, etc.

We need to spend enough time measuring our results to ensure our impact. At the same time, we don’t want measuring to take up so much time that we don’t carry out our strategies to achieve our goals.

Prior to any activity, we identify goals and measures. We may set benchmarks based on prior history. We report measures during our evaluation and analysis of each activity.

We’ve outlined priority measures. We may add or modify measures as time progresses.

1. Programs and services: workshops, conference, NPD
 - a. Quality of content and speakers
 - b. Participation rates:
 - i. Attendees: Total #. Repeat. New.
 - ii. Sponsors / exhibitors: Total #. Repeat. New
 - c. Participant satisfaction based on evaluations, anecdotes, etc.
 - d. Diversity of attendees, e.g., type and size of organization, staff and volunteers
 - e. Effectiveness of sales copy

2. Programs and services; advocacy and lobbying
 - a. Chapter participation in appropriate public policy endeavors
 - b. Level of participation by chapter participants in advocacy and lobbying

3. Governance and operations
 - a. Adherence to values, strategic plan, systems and processes, policies and procedures
 - b. Application of body of knowledge and best practice in governance and management
 - c. Volunteer participation
 - i. Availability of volunteers for board and committee positions, taskforces, and individual tasks
 - ii. Level of accountability demonstrated by volunteers in all positions
 - iii. Volunteer retention and satisfaction
 - d. Quality of administrative support
 - e. Quality of information and analysis of trends and implications to support decision-making
 - f. Level of adaptive capacity and innovation demonstrated in programs and services, governance and operations

4. Financial sustainability
 - a. Adherence to developed systems and processes, policies and procedures
 - b. Level of cash reserve
 - c. Diversity of revenue streams, e.g., registration fees, sponsorships, charitable gifts, etc.

5. Continuum of communication, coordination, collaboration, partnerships
 - a. Breadth, depth, and diversity of relationships
 - b. Level of engagement along various points in the continuum
 - c. Satisfaction of AFP RI and others in the relationships
 - d. Invitations for AFP RI to participate in diverse community activities and convenings
 - e. Referrals to AFP RI by diverse constituencies
 - f. AFP RI presence and visibility at key tables, in key situations

6. Other
 - a. Engagement of advanced executives in various chapter activities: Total #. Repeat. New.
 - b. Chapter engagement with media, e.g., queries from media, outreach to media, etc.

Annualizing the multi-year plan

The multi-year strategic plan provides overall direction for the AFP RI Chapter. But the strategic plan does not substitute for annual planning. Annual planning incorporates four core elements:

1. Progress on the multi-year strategic planning
2. Update on the external environment, and trends and implications for the chapter
3. Mini analysis of chapter operations
4. Annual priority setting based on items #1 – #3
5. Annual budgeting based on #4

This annual process is not as comprehensive nor as lengthy as the multi-year strategic planning process. Nonetheless, each of the four core elements is important.

Our taskforce provides a bit of background information and summary highlights and convenes a planning retreat in the last quarter of the fiscal/calendar year. This retreat, just 2 – 3 hours in length, allows us to set priorities for the new fiscal year. With those annual priorities in hand, the Finance Committee prepares the budget for the new fiscal year – for action at the December board meeting.

Transparency and communications

Our values talk about transparency and excellence. We're committed to regular and sufficiently frequent communication with our target audiences – and that includes sharing this strategic plan and our annual priorities.

In particular, we will make sure that our participants (e.g., members, attendees, etc.), collaborators/partners, and sponsors and donors understand why the chapter matters, what it's doing, and its impact in the community.

We know that the chapter cannot be all things to all people. We will clearly communicate what we can do – and what we cannot do. We will clearly communicate that we are an all-volunteer organization, committed to service but, at the same time, limited.

General calendar for AFP RI Chapter | 2013

Month	Programs and Services	Chapter Operations and Governance Activities
January	Education workshop	Board meeting
February	Education workshop	Board meeting
March		Board meeting
April	Conference	Board meeting
May	Networking breakfast	Board meeting
June	Education workshop	Board meeting
July		Board meeting
August	Networking breakfast	
September	Education workshop	Board meeting: Annual planning session
October	Education workshop	Board meeting: Approve 2014 priorities. Elect board members and officers.
November	National Philanthropy Day	
December	Networking breakfast	Board meeting: approve fiscal year budget